SiteManager
Training Manual

Module A
Chapter 2

Contract Administration (+)
Contract Records (+)
Contract Funding

Section A-2-5-2
Viewing Contract Funding

Student's Version

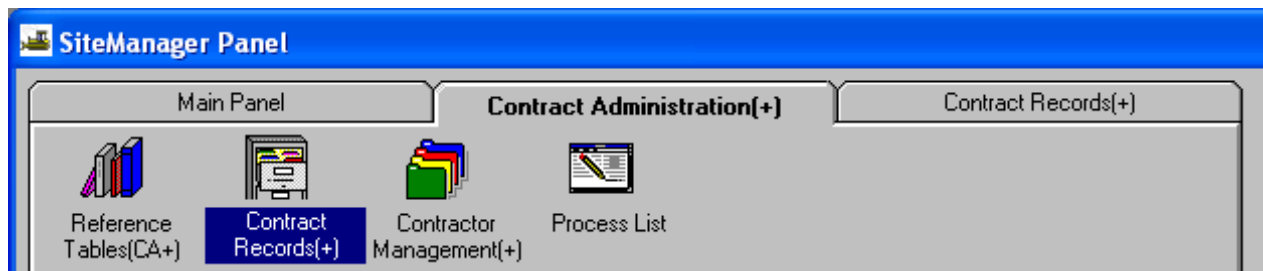Indiana Department of Transportation
August, 2007   Version 3.7b

This page intentionally left blank

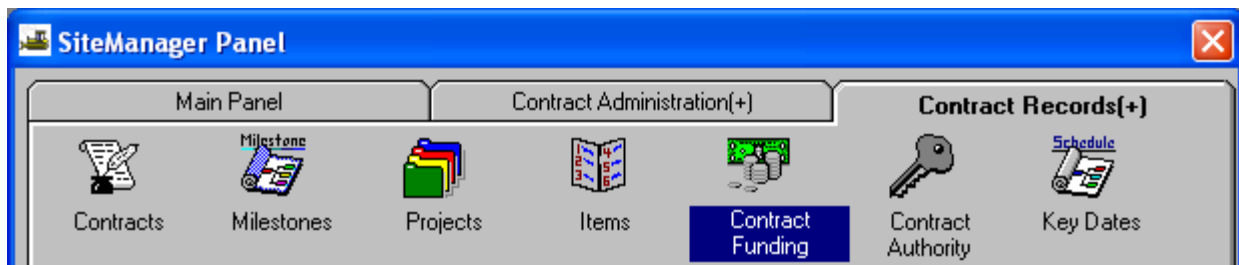# Viewing Contract Funding Information

The funding for a contract is set up in the Contract Funding window.

"Double-click" on **Contract Administration (+)** located on the Main Panel.

"Double-click" on **Contract Records (+)**

"Double-click" on **Contract Funding**.

The **Contract List** panel will open:

If the **Contract List** panel does not open then "click" on the **Open** 📂 button on the toolbar.

The bottom panel contains columns for:
- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate cont "Double click" on the appropriate **Contract ID.**

The Contract Funding panel lists the current funding specifications in the top panel. Data for the selected funding record is displayed in the bottom panel.

Project Number: the **Project Number** is a unique number assigned to the project.

Funding Source Code: **Funding Source Code** is coding assigned by Procurement.

Funding Source Description: Funding Source Description is a description of the funding source assigned by Procurement.

Category Number: Category Number is a grouping of Items assigned during the design phase. Items can be grouped within Categories for various funding reasons.

Source Participation Percent: **Source Participation Percent** is the percentage of the total amount in the Project/Category provided by the Funding Source. (For example, many federal aid Funding Sources provide 80% of the funding for the Project/Category.).

Priority Order: Priority Order indicates the order in which funds are appropriated to the Contract.

Line Item Number: **Line Item Number** is the Project Line Item Number of a Non-Participating item on the project. The Non-Participating Items have their own Funds and set of priorities within the project.

Local Agreement Nbr: Local Agreement Nbr are numbers used to identify an agreement between a local authority and the INDOT. The agreement defines the funding provided by the local authority with regard to a particular Contract.

Federal/State Project Nbr: **Federal/State Project Nbr** is the number assigned for the Federal/State Project Number.

Purchase Order Nbr: Purchase Order Nbr is the number of the Purchase Order.

Original Cap Amt: Original Cap Amt is the original amount of funding for the selected fund.

Current Cap Amount: is the funding amount from the purchase order for the selected fund. Additional funds from Advice of Change form associated to the selected funding source will modify the Current Cap Amount.

Previous Estimate Amt Used: Previous Estimate Amt Used is the amount used from the selected fund on approved estimates.

Current Estimate Amt Used: Current Estimate Amt Used shows the current generated estimate amount for selected funding source.

"Click" on the **Generic Fields** button located on the toolbar.

Federal Priority: The Federal Priority is the priority listed on the purchase order.

"Click" the **Generic Fields** button located on the toolbar to close the Generic Fields panel.

"Click" the **Close** button located on the toolbar.

Viewing Contract Funding

A-1-2-5-2 Group Exercise

What's the total funds spent on previous and current estimates on project 9620710 of Contract R -90007?

Login   inquire
Password   pass

Double-click on **Contract Administration (+).**
Double-click on **Contract Records (+).**
Double-click on **Contract Funding**
Click the Open button
Select Contract ID   R -90007

Top Panel: Select the entry for
     Project   9620710
     Funding Source Code   H24

Bottom Panel:
Previous Estimate Amount Used: _____.
Current Estimate Amount Used: _____.

Top Panel: Select the entry for
     Project   9620710
     Funding Source Code   01

Bottom Panel:
Previous Estimate Amount Used: _____.
Current Estimate Amount Used: _____.

Total Funds Used: _____.

"Click" **Close.**

This page intentionally left blank.